

**Mecklenburg County Public Schools**

**Employee Self Serve Manual:  
For Employee Use**

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**\*\*YOU ARE REQUIRED TO ACCESS EMPLOYEE SELF SERVE EACH MONTH IN ORDER TO DOWNLOAD OR VIEW YOUR MONTHLY PAYSTUB. YOU WILL NOT RECEIVE A PRINTED PAYSTUB FROM PAYROLL.**

**\*\*YOU WILL ALSO BE REQUIRED TO VIEW AND DOWNLOAD YOUR ANNUAL W-2 Wage & Tax Form EACH YEAR TO FILE FEDERAL AND STATE TAXES. (See Page 5 for set up instructions.)**

## WHAT IS EMPLOYEE SELF SERVE?

Employee Self-Serve is an online portal that allows employees to view and edit their personnel and payroll-related information. It serves as not only a great resource for employees, but also as an efficient way for employees to communicate changes to the Payroll and/or Personnel Department, and receive confirmations of their requests.

### URL to Access Employee Self-Serve from a computer or smartphone:

To get to the Employee Self-Serve portal, go to: [www.mcpsweb.org](http://www.mcpsweb.org), Click on Resources, scroll down to Employee Self Serve Log In, left click to open:

### LOGIN

Username:

Password:

Remember Me

Login

[Lost My Password](#)

**User Name:** Your Username is always the ID 6-digit Personnel # that is assigned to you as long as you are employed by MCPS. If you don't remember this 6-digit ID #, your location secretary or the Personnel Department can give you this 6-digit ID number. It is not the 3-digit User ID on your ESS Profile page.

**Password:** Your initial Password is [First Initial] [Last Initial] [Last 4 Digits of SSN]. For example, William ("Bill") Anderson is your legal name, with an SSN of 555-55-1234, would have this Password: WA1234. This field is case-sensitive; letters must be upper-case.

**First Login:** Upon first login, you will be prompted to choose and answer a security question. In order to establish a new password, you will need to provide the answer to this security question. Password guidelines can be found on Page 3. For security purposes, Passwords expire every 60 days.

**Failed Login Attempts:** After 3 failed attempts, your User Name will be locked for 2 hours, for security purposes. Be patient, and type slowly when logging in.

**Lost My Password:** If you have forgotten your Password, click the Lost My Password link. You will be prompted to enter your Username and Email Address, and then click

Reset Password. You will then be asked to provide the answer to the security question you chose when you logged into ESS for the first time. Once you click Continue, you will receive an Account Re-Activation email with information. When you receive this email you will need to again log in to ESS. You can now set up your new password. It is required that you change your password every 60 days (by going to My Profile, and clicking the Change Password link) to one that you will more easily remember.

## MY PROFILE

The screenshot shows the Poquoson City Public Schools Employee Self-Serve dashboard for Jennifer Anderson. The top navigation bar includes the school logo, the name 'Poquoson City Public Schools', and the user's name 'ANDERSON\_JENNIF (my profile) (logout)' along with the last login time 'Last Login: July 28, 2010, 9:04 am'. Below this is a 'Dashboard' header with the text 'EMPLOYEE SELF SERVE → JENNIFER ANDERSON'. On the left is a vertical menu with options: Profile, Personal, Jobs, Education, Certifications/Licenses, Endorsements, Benefits, Attachments/Documents, Criteria, Leave, and Logout. The main area contains ten icons representing different self-serve functions: My Profile (person icon), My Personal Information (ID card icon), My Jobs (briefcase icon), My Education (plus sign icon), My Certifications/Licenses (document with ribbon icon), My Endorsements (document icon), My Benefits (family icon), My Attachments & Documents (folder icon), My Criteria (hammer icon), and My Leave (airplane icon).

In **My Profile**, which you can access from any of the three locations indicated above, you can:

- Verify your email address to which notifications will be sent

**If the email address is missing or incorrect, please update the Email Address field in Personal / My Personal Information, on the Personal tab as your first task.** If the correct email address is not in the system or missing, then there is no way for a reset password instruction email to be sent to you in the event you ever forget your password.

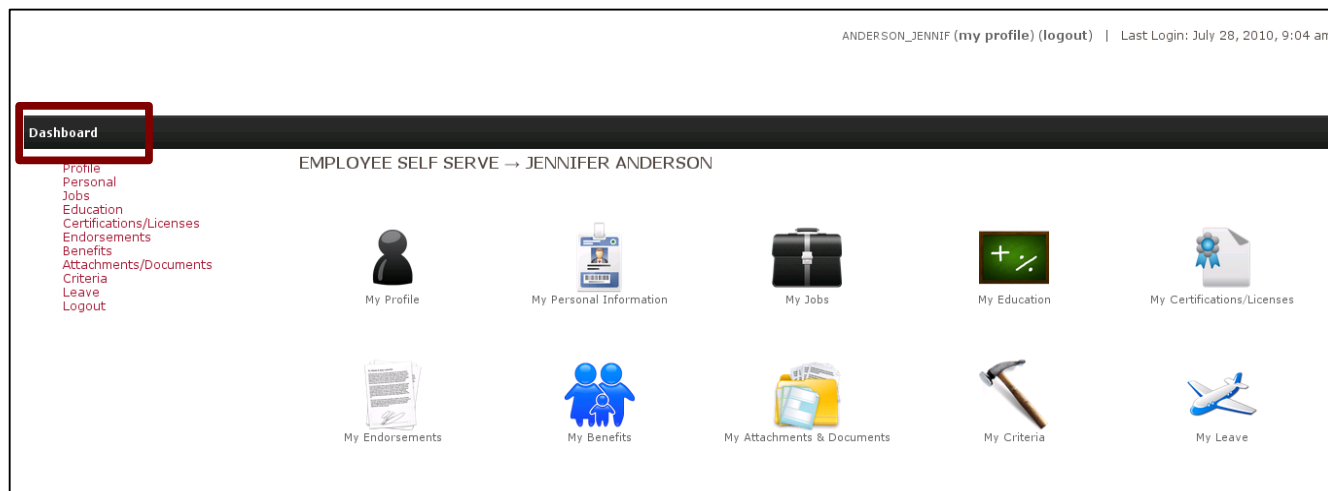
- Verify your home phone number

If the phone number is incorrect, please update the Home Phone field in Personal / My Personal Information, on the Personal tab.

- Change your password

- Passwords must be between 6 and 50 characters long.
- They can contain upper and/or lower-case letters, numbers and special characters.
- Strong passwords contain a mix of all the above, and do not include easily-guessable names or dates.
- This field is case-sensitive . If you set it up with CAPS, you must always use caps.

# DASHBOARD



On the **Dashboard** (pictured above), you can see the accessible areas within the Employee Self Serve portal. To access a particular area from the Dashboard, you can either click on the appropriate **side bar item** on the left of the screen, or the **icon** in the middle of the screen. To get back to the Dashboard at any time, just click on “Dashboard” in the menu bar (indicated above).

## ACCESSIBLE AREAS

### IMPORTANT NOTES

- **CUT-OFF PERIOD:** Although your data will update in Employee Self Serve as soon as you click Submit/Update, it will not be updated in the payroll database until the **Payroll Department** manually downloads your changes. In order for your changes to be reflected in the upcoming payroll, you must submit them **no later than the 15<sup>th</sup> of the month.** Changes made after that cutoff will be made effective with the subsequent pay date.
- **NAME CHANGES:** The Name fields are not editable in Employee Self Serve. If you need to correct your name, bring the appropriate documentation to the **Personnel Department**, and they can make the necessary updates. **If you change your name due to marriage or divorce, you must apply for and receive a new social security card with the updated name.**
- **BIRTH DATE CHANGES:** Due to strict life insurance and retirement requirements, any changes to your or your spouse's birth date must be submitted directly to the **Payroll Department** with the appropriate documentation.

○ **W-4 CHANGES:** Per IRS regulations, before any federal or state withholding changes can take effect in payroll, a new Form W-4 (or VA-4 state form, if applicable) must be received by the **Payroll Department**. **Payroll Department** personnel will make all changes in ESS as well. A blank W-4 form can be downloaded from ESS, by clicking on the Filing tab in Personal Information, then click on Download a W-4 Form.

**If you change your name due to marriage or divorce, you must apply for and receive a new Social Security card with the updated name change before submitting a new W-4 to Payroll or Personnel. This new social security card should be attached to the completed new W-4 and VA-4.**

## PERSONAL / MY PERSONAL INFORMATION

To **EDIT** your Personal Information, click the **Edit** button, located in the upper-right corner of the screen (as indicated below).

Dashboard

EMPLOYEE SELF SERVE → JENNIFER ANDERSON

Personal Address Status Filing Longevity Emergency Contact Emergency Physician

Personnel ID: ANDERSON JENNIF Name: Jennifer A Anderson Edit

SSN: XXX-XX-1234 Salutation:

First Name: JENNIFER Middle Name: A

Last Name: ANDERSON Lineage/Suffix:

Alt Name:

Birth Date: 06/13/1983 Age: 27

Gender: Female Marital Status: Single

Ethnicity: WHITE

Work Phone (Ext): 757-444-4444 ext. 100 Home Phone: 757-555-5555

Cell Phone: 757-333-3333 Email Address: JEN.ANDERSON@POQUOSON.K12.VA.US

Spouse

Name: Lineage/Suffix:

Spouse SSN: Spouse DOB:

All editable fields will now be accessible (as pictured below). Enter the new/corrected data, and then click the **Update** button, located at the bottom of the screen. If multiple fields need to be updated, even across multiple tabs within My Personal Information, populate them all as applicable, and then click Update.

**PAPERLESS W-2'S** - Must enroll through ESS "Filing" to be received electronically. Click on the FILING tab, click on "Electronic W-2 Enrollment", then follow directions and click "ACCEPT" at the bottom, & click SUBMIT. Once you have "Accepted" and submitted, you will not have to do this each year. If you want to change this decision for the next year & receive a printed W-2, simply follow instructions above and "uncheck" the Accept box, then Submit.

**Please Note:** Former employees will not have access to ESS, therefore, their W-2 Form will be mailed to them in paper form by January 31 of the following year.

**Dashboard**

PERSONNEL INFORMATION (UPDATE) → JENNIFER ANDERSON

[Profile](#)  
[Personal](#)  
[Jobs](#)  
[Education](#)  
[Certifications/Licenses](#)  
[Endorsements](#)  
[Benefits](#)  
[Attachments/Documents](#)  
[Criteria](#)  
[Leave](#)  
[Logout](#)

**Personal** | Address | Status | Filing | Longevity | Emergency Contact | Emergency Physician

SSN: 123-12-1234  
 Salutation:   
 First Name: JENNIFER Middle Name: A  
 Last Name: ANDERSON Lineage:   
Name changes are processed through your Personnel Department with proper documentation.  
 Alt Name:  Birth Date: 06/13/1983  
 Gender: Female Marital Status: Single  
 Ethnicity: WHITE  
 Work Phone: 757-444-4444 Work Phone Ext: 100  
 Home Phone: 757-555-5555 Cell Phone: 757-333-3333  
 Email Address: JEN.ANDERSON@POQUOSON.K12.VA.US

Spouse

First Name:  Middle Name:   
 Last Name:  Lineage:   
 Spouse SSN:  Spouse DOB:

**Update**

## BENEFITS

**EXISTING BENEFITS/DEDUCTIONS** will appear in the grid. In the example below, the employee has only one deduction. You cannot make any benefits changes through ESS. You must notify Payroll or Personnel by email or in writing along with proper documentation.

**Dashboard**

BENEFITS → JENNIFER ANDERSON

[Profile](#)  
[Personal](#)  
[Jobs](#)  
[Education](#)  
[Certifications/Licenses](#)  
[Endorsements](#)  
[Benefits](#)  
[Attachments/Documents](#)  
[Criteria](#)  
[Leave](#)  
[Logout](#)

	Deduction	Account Number	Adjustment Amount	Description	Life-Time Amount	Status
1	COLONIAL LIFE & CANCER-PRETAX		\$ 1.25	CCANC CA	\$ 0.00	Active / Edit

## ATTACHMENTS / DOCUMENTS









### DOWNLOADING CHECK STUBS/DIRECT DEPOSIT TRANSMITTALS and W-2's

To view an archived check stub, direct deposit transmittal, or W-2, you will click that record's **Download Now** icon (as indicated below), and it will download to your screen.

An email notification will be sent by January 31 each year when the current C/Y W-2 Wage & Tax Form is available. Any prior years not showing are not available electronically.

## My Attachments/Documents

Add More Documents/Attachments 

Date	Name	Type	Size	Downloaded Last	
2012/03/30	2012-03-30 DIRECT DEPOSIT TRANSMITTAL	DIRECT DEPOSIT	11.07 KB	2012/04/18	 
2012/02/29	2012-02-29 DIRECT DEPOSIT TRANSMITTAL	DIRECT DEPOSIT	11.06 KB		 
2012/01/31	2012-01-31 DIRECT DEPOSIT TRANSMITTAL	DIRECT DEPOSIT	11.02 KB		 
2011/12/20	2011-12-20 DIRECT DEPOSIT TRANSMITTAL	DIRECT DEPOSIT	3.05 KB		 

## RE-NAMING A SAVED DOCUMENT


You have the ability to rename any documents, as desired. You may wish to rename them to achieve a certain sort order. Note that the default sort order can be changed at any time by clicking any of the column headers.

To change the name of a document, click that record's **Edit** (pencil) icon. You will be taken to a “Stored Document Update” screen, on which you can edit the **File Name** and click **Update** to save (see example of document name change below).

RENAME DOCUMENT [Back to List](#)

03/26/2010 ARCHIVED CHECK STUB

File Name:

Date Received: 03/26/2010  
Type:  (PDF)

## ATTACHING A NEW DOCUMENT

You have the ability to attach HR-related documents in the Attachments/Documents grid. Your supervisor and Payroll personnel can also add relevant documents as a way to organize your records and share information with you.

*NOTE: Documents can be viewed by your supervisor and Payroll personnel, and can only be deleted by Payroll, so only attach documentation that you deem appropriate.*

To attach a document, click **Add More Documents/Attachments** in the upper-right corner of the screen (see below).

You will be taken to a new screen (see below), on which you provide a **File Name**, choose the appropriate **Document Type**, click **Browse** to select the file, and click **Submit** to save.

**Stored Document (Add)**

**Upload A File From Your Workstation**

File Name:

Document Type:

Select File:

Once documents have been brought into your Attachments/Documents grid, you have the option of renaming them (by following the instructions on Page 7), so that they can appear in the sort order of your choice.

## DELETING A DOCUMENT

If you want to delete a document that you saved in Employee Self-Serve, ask a member in the **Payroll Department** to delete it on your behalf.

## LOGOUT

To log out of Employee Self Serve, you can simply click the **Logout** side bar item. If you are on the Dashboard, you also have the option of clicking **logout** in the upper-right corner of the screen. The screen shot below indicates both options available on the Dashboard.

If there is inactivity for a period of time, the system will notify you that it will be logging out automatically in a few seconds. At that time you have the option to click and stay logged in.

